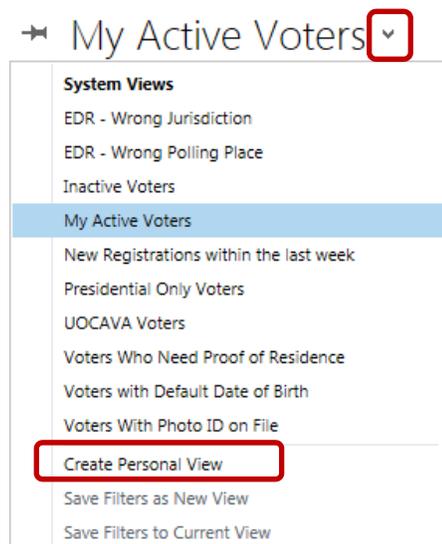


1.5 Advanced Features

Learn to create a custom Associated View (Personal View), while not mandatory, it is a power way to control how data is managed and displayed in a grid or exported into spreadsheets. This is especially important for data reports of +10,000 records. This view is created through WisVote's Advanced Find feature.

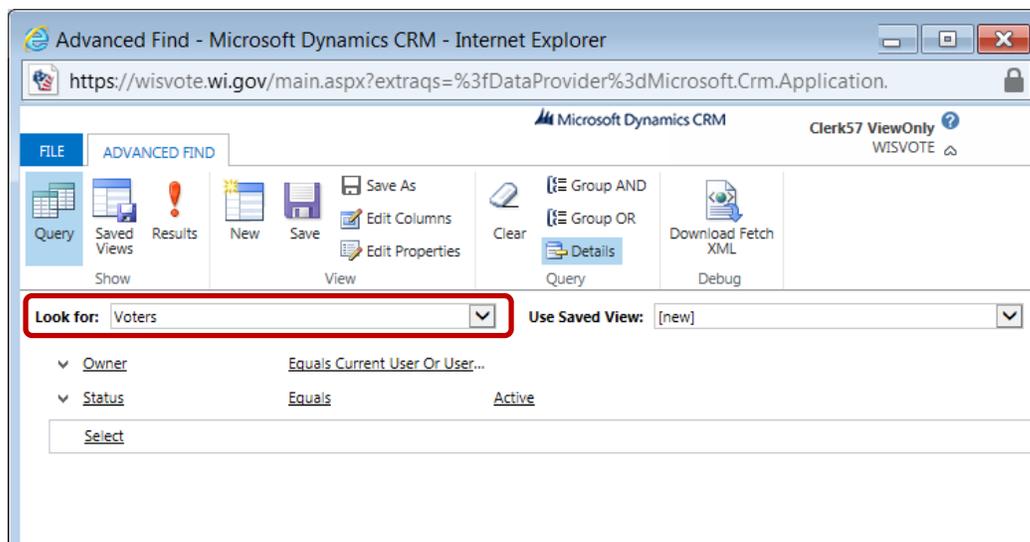
Create Personal View

1. A personal view can be created for any view. Go to any view displaying a grid. For example: Preparing a Walking List, click the Voter List tile on the Easy Navigate page
2. The view will display a default system view (e.g. My Active Voters). There are other view options including a *Create Personal View*. Clicking the chevron shows a drop-down list of these other views
3. Select Create Personal View



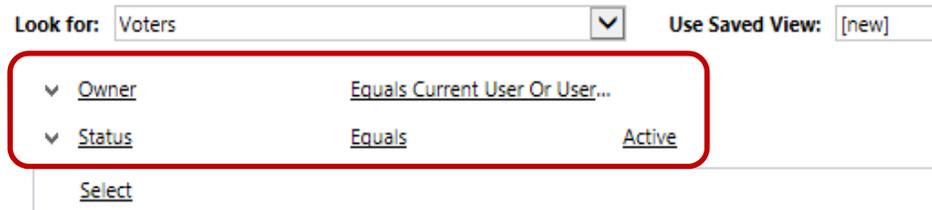
Advanced Find Feature

4. This opens the *Advanced Find* pop-up window. Use this to configure a list of filter parameters for a personal view. Begin with selecting the result you want in the *Look for* field. The default option is chosen by the current view, but you can choose from others in the drop-down list

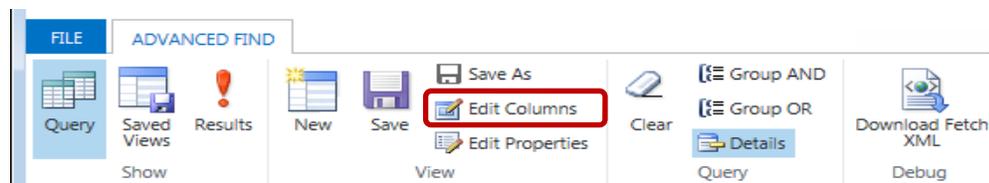


Set More Parameters

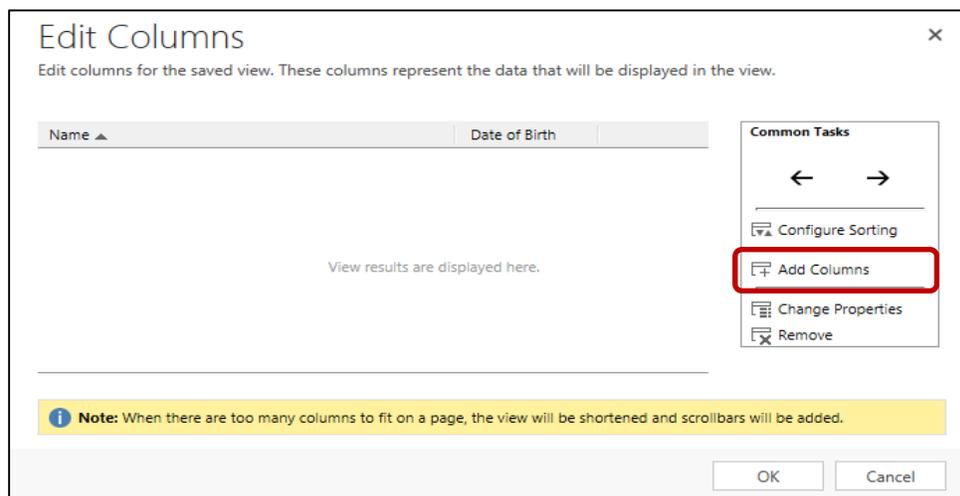
- The entity selected in *Look for* sets the default parameters. These can be changed, but more often they are desired. Other options can be added by clicking Select. For this example no changes are needed as "my" active voters are desired for the Walking List.



- To further specify what information will be included in our personal view, click Edit Columns



- The *Edit Columns* window opens. A Common Task section has a menu of editing options. Shown are the two columns from the Voter entity. If more data is needed, click Add Columns



The *Add Columns* window opens. The Record Type is what is in the *Look for* field (Step 4). The Record Type determines the available columns. For this example the columns need to include data that was not entered in the Voter record, but was entered in the Address record. The Record Type needs to be changed to an Address-related type.

- To change the Record Type, click the drop-down and select Home Address (Address)

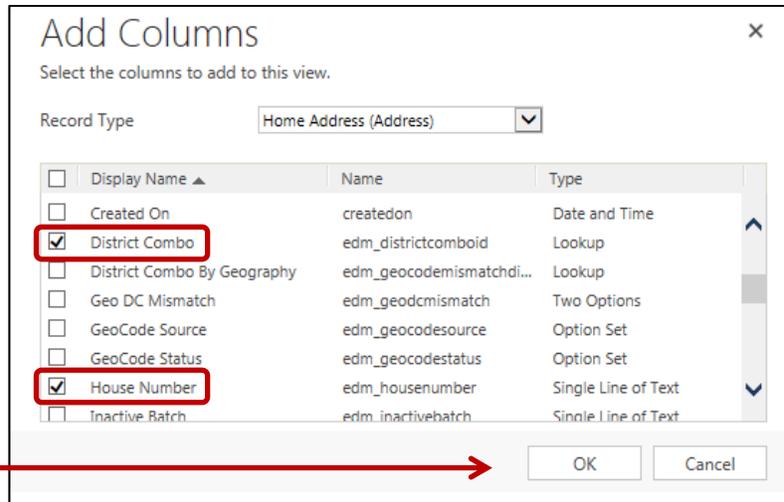


Walking List needs:

- District Combo Code
- House Number
- Street Name

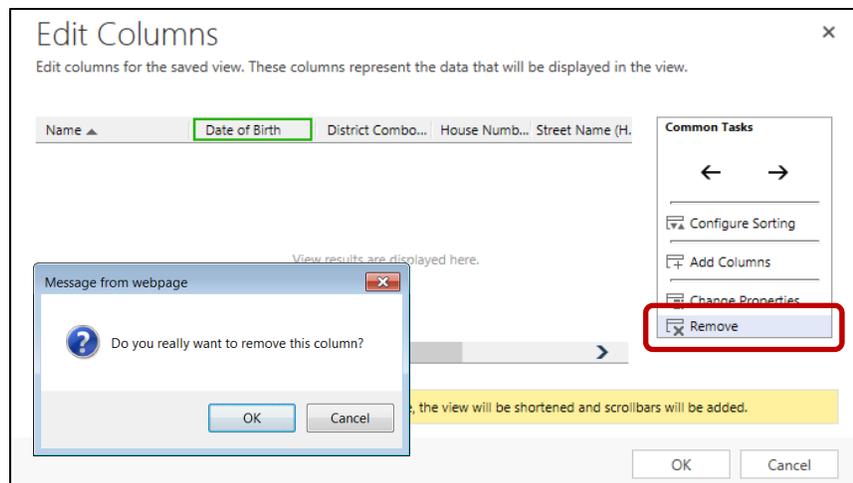
9. Use the scroll bar and then select the columns needed for the Personal View (e.g. Walking List, *Street Name* not shown)

10. To add the columns click OK

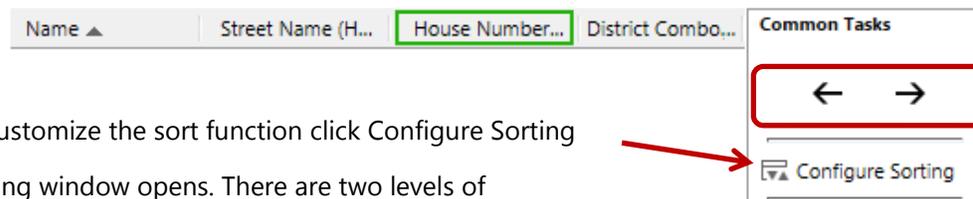


11. The new columns show. Verify no columns include private data. To remove DOB, click on the column and then click the Remove button

12. Click OK



13. (Optional) Use the arrows ← and → in the Common Tasks menu to organize columns. Select a column and then click the arrow to change its order. (There is no wrong or right order)



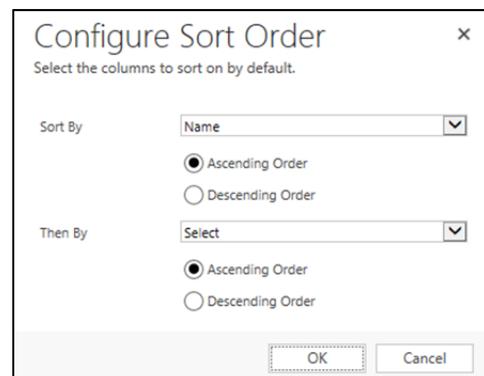
14. (Optional) To customize the sort function click Configure Sorting

The Configure Sorting window opens. There are two levels of sorting. The default sort will be limited to the primary record type. For this example: The Voter record type was limited to Name. The only Sort By option then is Name. The only Sort By option then is Name.

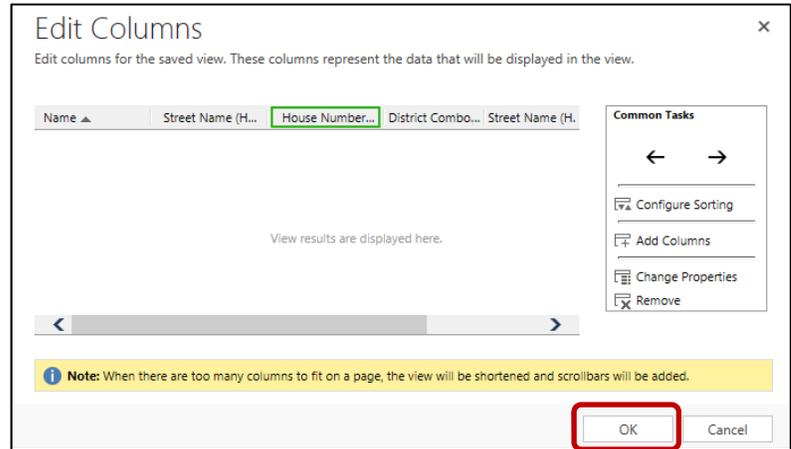
(Street Name, House Number and District Combo are from the Home Address record type.)

If there were multiple columns from Voter the secondary sort could be chosen in the Then By drop-down.

15. (Optional) If changes were made click OK. For this example click Cancel

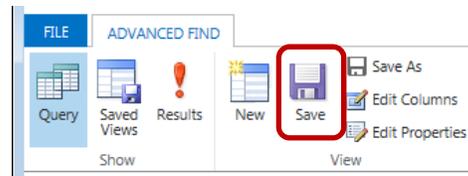


- With all the columns added, configured, and sorted save these changes by clicking OK

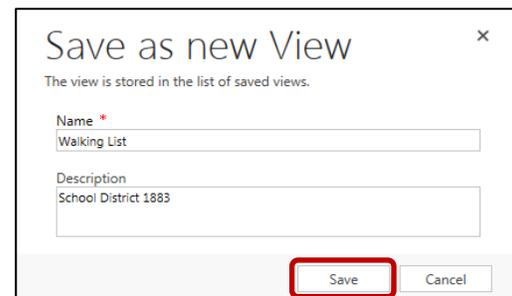


Save to a Personal View

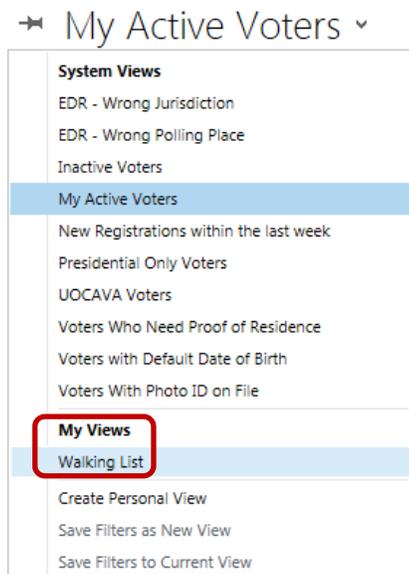
- For a reoccurring list to include as a personal view in your system views list click Save
(For one-time lists skip to Step 19)



- Enter a Name and Description. Then click Save

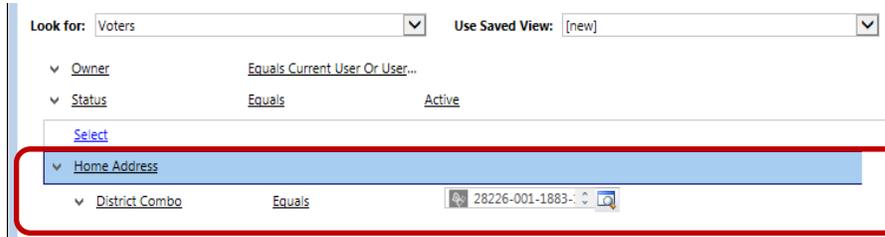


The Voter System Views list now has a My Views section and under it the newly created personal view called Walking List.

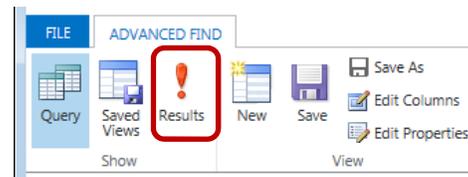


View Results

If this Personal View is for a one-time list, additional filters can be added (e.g. Walking List for all district combos for a specific school district).



- When all the parameters are set it is time to get the list of matching records, click Results

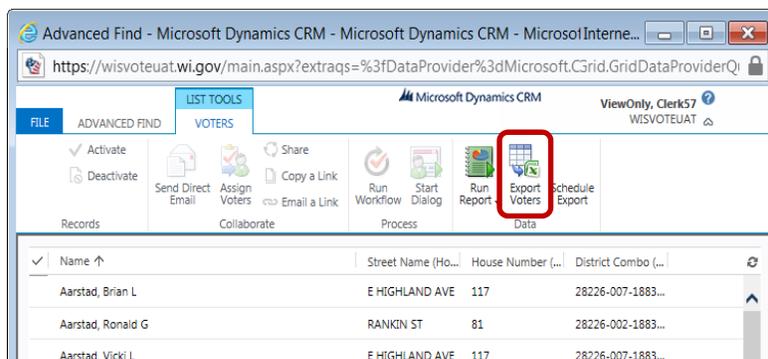


Export a List

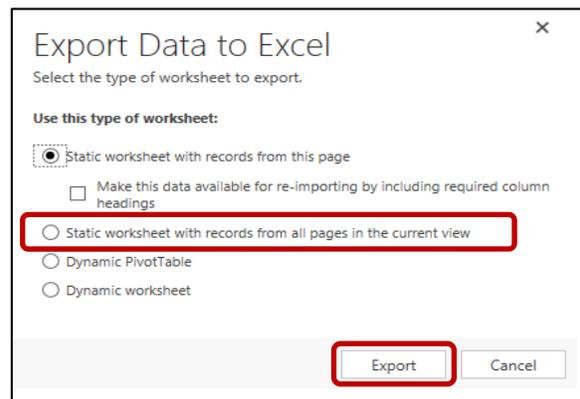
Advanced Find Export

- For the one-time list after clicking Results a new *List Tools* tab displays. The tab is labeled Voters because the personal view is configured for a list of active voters (Step 4).

To export the information click Export Voters



- The *Export Data to Excel* window opens. The default, Static worksheet is limited to the first 50 records. To include records from all pages select the 2nd Static worksheet and click Export



- Save the spreadsheet to your computer. Click Save

! A Microsoft Patch may prevent file opening. See configuration instruction at the end of this section.

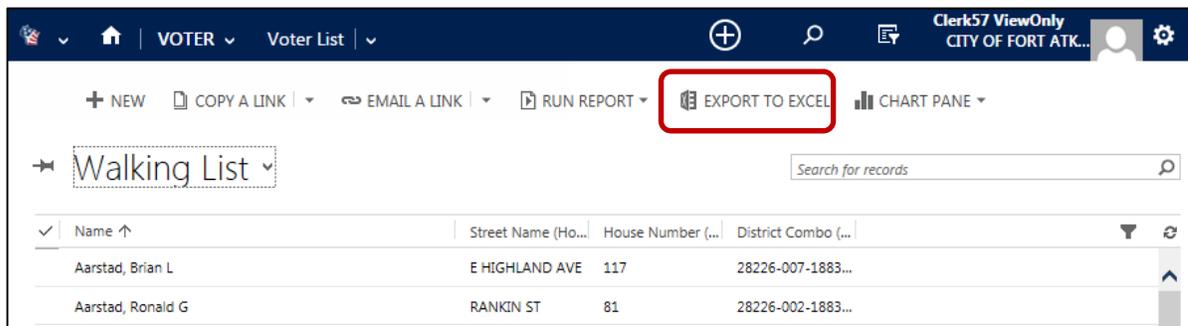


Personal View Export

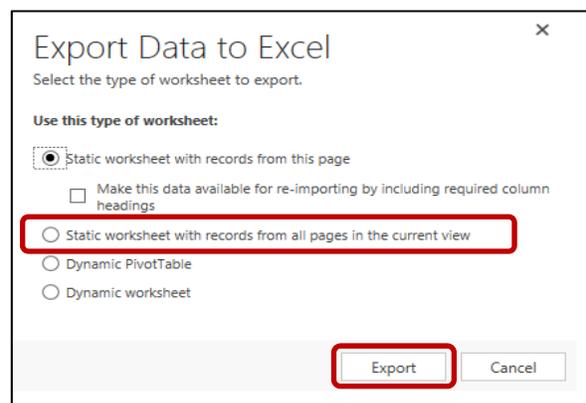
1. Choose the personal view from the System Views list (e.g. select Walking List)



2. From the personal view click Export to Excel.

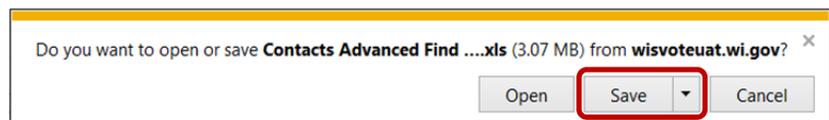


3. The *Export Data to Excel* window opens. The default, Static worksheet is limited to the first 50 records. To include records from all pages select the 2nd Static worksheet and click Export



4. Save the Excel spreadsheet to your computer. Click Save

! A Microsoft Patch may prevent file opening. See configuration instruction at the end of this section.

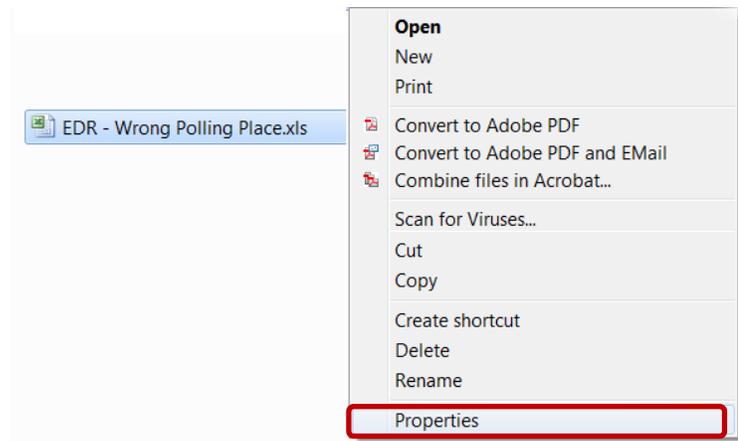


Exporting Data to Excel from a Website (like WisVote)

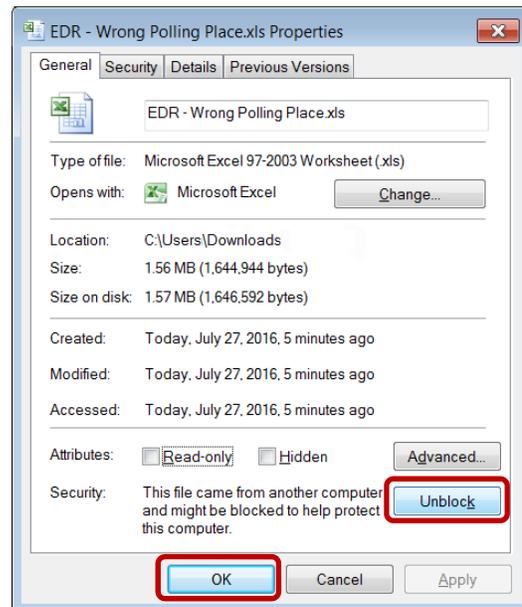
Microsoft recently added security patches restricting access to downloaded, online spreadsheets. The feature can be disabled for individual files or MS Excel can be configured to disable the security feature entirely. Please consult with your IT department before disabling this security feature. (Included are both options.)

Configure to Allow Per Use

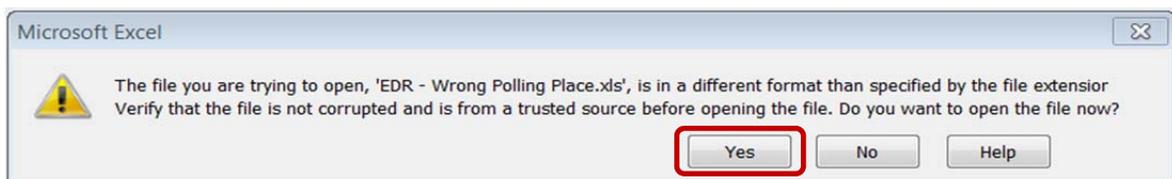
1. Right click on excel file
2. Click **Properties**



3. Click **Unblock** and **OK**

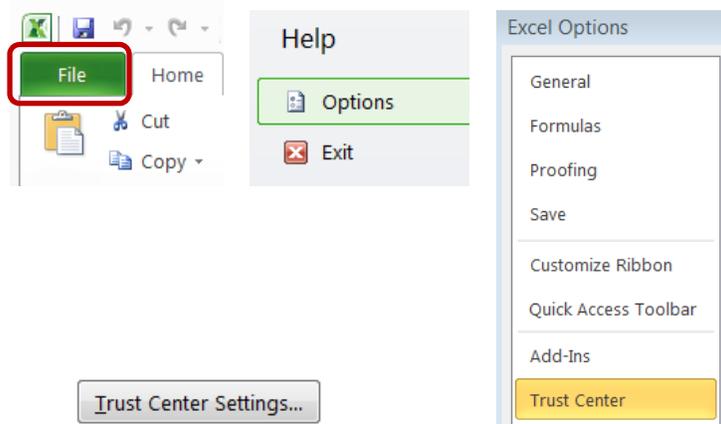


4. Open the Excel file
5. Click **Yes** and spreadsheet opens

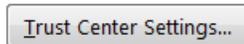


Configure to Open All Downloaded Spreadsheets

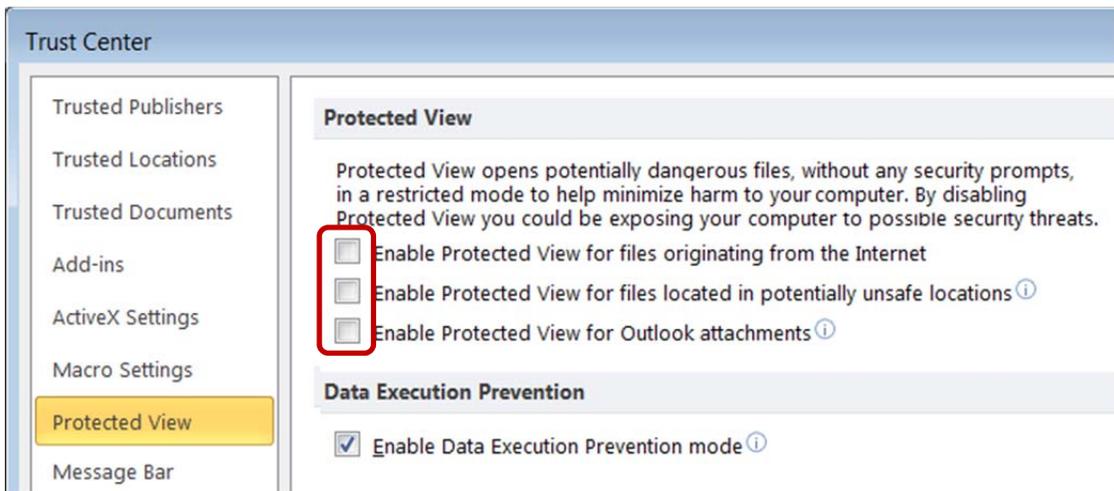
1. Open Excel
2. Click the **File** tab
3. Click **Options**
4. Click **Trust Center**



5. Click **Trust Center Settings**



6. Click **Protected View**
7. Uncheck the 3 Protected View options



8. Click **OK**; Click **OK**